

PS 3933.03 UNIT SECRETARY TRAINING AND REFERENCE GUIDE



Change Notice

DIRECTIVE AFFECTED: 3933.03
CHANGE NOTICE NUMBER: 3933.03
DATE: 6/25/98

1. PURPOSE AND SCOPE. To update applicable ACA Standards in the Program Statement, Unit Secretary Training and Reference Guide.
2. SUMMARY OF CHANGES. This Change Notice updates the Directives Referenced and ACA Standards sections.
3. ACTION. File this Change Notice in front of the Program Statement, Unit Secretary Training and Reference Guide.

/s/
Kathleen Hawk Sawyer
Director



Program Statement

OPI: CPD
NUMBER: 3933.03
DATE: 6/25/98
SUBJECT: Unit Secretary Training
And Reference Guide

1. PURPOSE AND SCOPE. To provide guidance and direction for the training and development of Unit Secretaries.

2. PROGRAM OBJECTIVES. The expected results of this program are:

- a. Unit Secretaries will be provided a formal training plan;
- b. Unit Secretaries will be proficient in all mandatory training areas; and,
- c. Unit Secretaries will be provided reference materials to resolve routine secretarial and unit/case management related problems.

3. DIRECTIVES AFFECTED

a. Directives Rescinded

PS 3933.02 Unit Secretary Training and Reference Guide
(5/10/96)

b. Directives Referenced

PS 3510.08 Case Management Coordinator, Role of
(6/16/97)
PS 3906.16 Employee Development Manual (3/21/97)
PS 5321.06 Unit Management Manual (7/31/96)

4. STANDARDS REFERENCED

a. American Correctional Association 3rd Edition Standards for Adult Correctional Institutions: 3-4082

b. American Correctional Association 3rd Edition Standards for Adult Local Detention Facilities: 3-ALDF-1D-14

c. American Correctional Association 2nd Edition Standards for Administration of Correctional Agencies: 2-CO-1D-06

d. American Correctional Association Standards for Adult Correctional Boot Camp Programs: 1-ABC-1D-12

5. RESPONSIBILITIES. Wardens shall ensure that newly selected Unit Secretaries participate in the formal training program which includes, at a minimum, the components presented in the Unit Secretary Training Plan (Attachment A). The Associate Warden (Programs) shall designate specific department heads, case managers or other staff to provide portions of the training.

The institution's Case Management Coordinator (CMC) is responsible for the overall coordination of the training program with assistance from the Employee Development Manager (EDM). The CMC shall coordinate Unit Secretary training activities with assistance from the employee's Unit Manager. Written documentation shall include lesson plans and schedules, which are to be reviewed by the CMC and Unit Manager and maintained by the EDM. Lesson plans shall be developed at the institution level.

6. ON-THE-JOB TRAINING. On-the-job training (OJT) has been determined to be the most effective method for preparing newly selected staff for the demands of their new positions. Accordingly, a minimum 80-hour OJT period at each institution is established. During the OJT phase, the Unit Secretary shall function with reduced caseload responsibilities while learning and performing secretarial duties. Mentors for Unit Secretaries shall ordinarily be secretaries with institution experience.

7. CERTIFICATION. Certification of proficiency in the Mandatory Training areas of the Reference Guide shall ordinarily be completed during the Unit Secretary's OJT period. It is recommended that promotion be contingent upon successful completion of all five mandatory training areas.

8. EDM. The CMC shall notify the EDM when the Unit Secretary's enrollment in the 80-hour OJT period has begun. Similarly, when the OJT period has ended, the completed certification shall be forwarded to the EDM for inclusion on the employee's training records. The EDM shall assist the employee's Unit Manager in monitoring the employee's career development plan.

9. EVALUATION. Upon completion of the OJT period:

a. The Case Management Coordinator, the employee's Unit Manager, and the employee shall meet to:

- ! discuss the employee's performance during the training period;
- ! identify additional training needs; and, discuss future expectations.
- ! This discussion shall be documented, signed by the CMC, Unit Manager, Associate Warden (Programs), and the employee to certify program completion.

b. The employee shall complete a written evaluation of the OJT program. This evaluation, at a minimum, must review the following areas:

- ! suitability of course content;
- ! length of training period;
- ! the three most important areas covered; and,
- ! changes that could improve the program.

The original shall be forwarded to the Region, and a copy to the institution EDM within 15 days of the program's completion. The Regional Correctional Programs Administrator shall appoint an individual in the Regional Office to be responsible for the receipt and review of the written evaluations.

/s/

Kathleen Hawk Sawyer
Director

UNIT SECRETARY TRAINING PLAN

1. MANDATORY TRAINING AREAS AND CERTIFICATION

All newly selected Unit Secretaries, including those at Pretrial facilities, shall be required to demonstrate their knowledge and skills of secretarial and case management topics. The topics listed below, because of their critical nature, require certification by the specified subject matter expert:

- (a) SENTRY;
- (b) Privacy Act/FOI/Locator Center;
- (c) Inmate Releases;
- (d) Central Files; and,
- (e) Parole Mini-Files (if applicable).

Certification of proficiency is required and awarded after Unit Secretaries have successfully demonstrated they can perform the task(s) listed under "Functions" for each performance objective. Competency must be demonstrated in all of the mandatory areas listed on the performance objectives certification forms. Note: During the 80-hour OJT period, circumstances may arise where the CMC may not have an actual case with which to measure the proficiency of the Unit Secretary in that specific subject matter area. When this occurs, the CMC shall create a hypothetical case in order to determine the Unit Secretary's knowledge in this area.

Certification forms can be retrieved from BOPDOCS. The Case Management Coordinator shall ensure that Unit Secretaries can demonstrate their ability to access documents through the use of BOPDOCS. A working knowledge of BOPDOCS is essential in order to retrieve current Program Statements and Operations Memorandums.

2. REFERENCE GUIDE

The Reference Guide shall be comprised of three major components:

(a) Current national Program Statements applicable to each unit/case management function (if BOPDOCS is available and easily accessible, hard copies of the Program Statements do not need to be maintained in a working binder);

(b) Current Institution Supplements (if applicable) for Program Statements (if LAN is available and easily accessible, hard copies of the Institution Supplements do not need to be maintained in a working binder);

(c) Other Memoranda. Unit Secretaries should maintain an up-to-date Reference Guide for use in resolving everyday secretarial and unit/case management issues.

The CMC shall either retrieve or assist the Unit Secretary in using BOPDOCS to assemble the Unit Secretary Reference and Training Guide (as outlined in Section 2). CMC's who do not have immediate access to BOPDOCS may, upon request, receive a Training and Reference Guide from the Chief, Policy Review and Development, Correctional Programs Branch, Central Office. The CMC shall also instruct the Unit Secretary on how to locate the appropriate Institution Supplements which implement Bureau Program Statements. If LAN is available, the CMC shall ensure that Unit Secretaries can demonstrate their proficiency in retrieving and using LAN for review of Institution Supplements. Unit Secretaries are responsible for updating their reference guides as policy and procedural changes are made.